

Job Aid:

How to Create a Solicitation Enabled Bid using a Release Requisition

This Job Aid shows how to:

- Create a Solicitation Enabled Release Requisition in COMMBUYS
- Convert the Requisition to a Bid
- Submit Bid to eligible Vendors

Of Special Note:

A solicitation enabled release is a documents used to solicit quotes from Vendors who have Master Blanket Purchase Orders (MBPOs), or contracts, in COMMBUYS. After creating the requisition the document can be converted to a bid, after approval, and sent the selected vendors. This COMMBUYS functionality allows you to comply with OSD policy for using many Statewide Contracts.

To use this functionality the MBPO must be designated solicitation enabled. Before beginning the requisition, access the MBPO> General tab and verify the Solicitation Enabled field displays a “Yes”

Screenshot



Directions

1. Launch the COMMBUYS Web site by entering the URL <https://www.commbuys.com/bsol/> in the Browser.

Enter your login credentials and click the **Login** button on the COMMBUYS home page.

Job Aid:

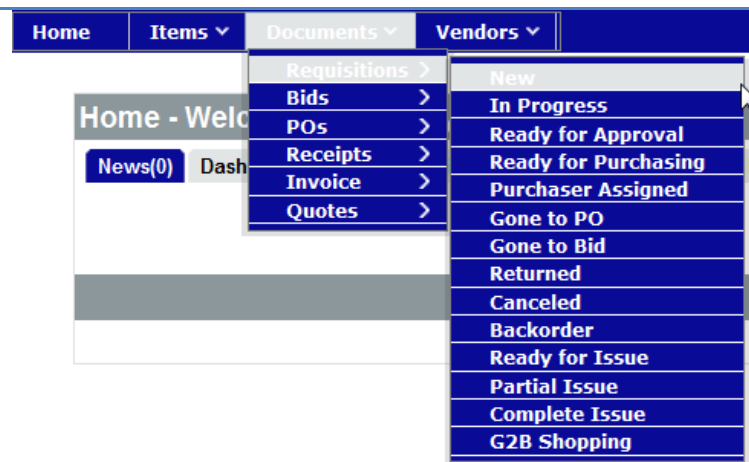
How to Create a Solicitation Enabled Bid using a Release Requisition

Screenshot



Directions

2. Upon successful login, if you have multiple roles in COMMBUYS, select the **Basic Purchasing** role tab on the upper right side of the page.



3. From the Navigation Bar, select **Documents > Requisitions > New**

Release Requisition RQ-15-1080-1080C-1080L-00000000858


General Items Vendors Distributors Address Accounting Routing Attachments

Requisition Number: RQ-15-1080-1080C-1080L-00000000858

Status: 1RI - In Progress

Department*: OSD01 - Operational Services Division

Location*: OSDEP - Congress St

Required By Date: 

Requisition Type: Release

Requestor: Buyer Buyer

Contact: Buyer Buyer

Alternate ID:

Estimated Cost: \$0.00

Print Format: * Requisition print form

Date Last Updated: 09/18/2014 01:41:12 PM

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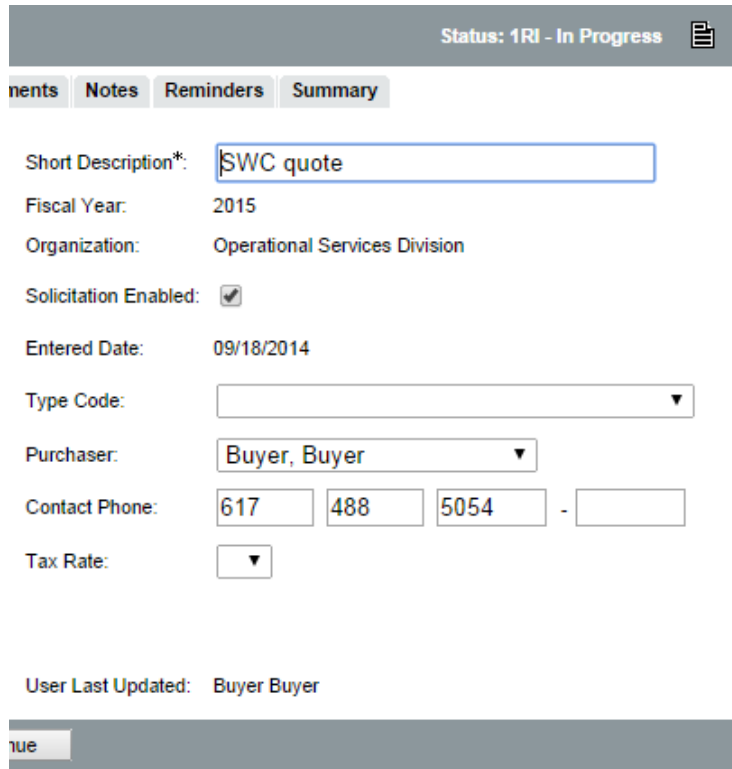
4. The General tab for the requisition opens. On the left side of the screen, complete the following fields:

- **Department:** defaults from user profile. May be changed, using the dropdown if other departments are available to user.
- **Location:** defaults from user profile. May be changed, using the dropdown if other locations are available to user.
- **Required by Date:** optional
- **Requisition Type:** RELEASE
- **Requester:** user that created the requisition; this field cannot be edited
- **Contact:** contact for this requisition
- **Estimated Cost:** calculated by COMMBUYS; not editable by user
- **Alternate ID:** leave blank

Job Aid:

How to Create a Solicitation Enabled Bid using a Release Requisition

Screenshot



Status: 1RI - In Progress

Short Description*: SWC quote

Fiscal Year: 2015

Organization: Operational Services Division

Solicitation Enabled: ☒

Entered Date: 09/18/2014

Type Code:

Purchaser: Buyer, Buyer

Contact Phone: 617 488 5054 -

Tax Rate:

User Last Updated: Buyer Buyer

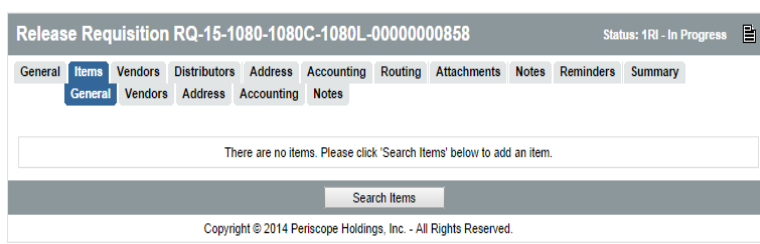
Directions

5. The right half of the **General** tab, complete the following fields:

- **Short Description:** be specific as this field is also used as search criteria to locate a requisition; may use any Departmental Identifier numbers.
- **Fiscal Year:** defaults to the current Fiscal Year
- **Organization:** default value based on your user profile and can only be changed by an administrator
- **Solicitation Enabled:** CHECK
- **Entered Date:** defaults to the current date and cannot be changed
- **Type Code:** type options are based upon the requisition type, leave blank
- **Purchaser:** defaults to your name; use the dropdown to select a different purchaser
- **Contact Phone:** defaults to the profile value; can be updated as needed
- **Tax Rate:** n/a for Commonwealth

When complete, click the **Save & Continue** button to save the information entered on the General tab.

6. To add items to the requisition, click on the **Items** tab.



Release Requisition RQ-15-1080-1080C-1080L-00000000858 Status: 1RI - In Progress

General **Items** Vendors Distributors Address Accounting Routing Attachments Notes Reminders Summary

General Vendors Address Accounting Notes

There are no items. Please click 'Search Items' below to add an item.

Search Items

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Click the **Search Items** button to begin the process of adding items to the requisition.



OPERATIONAL SERVICES DIVISION

Job Aid:

How to Create a Solicitation Enabled Bid using a Release Requisition

Screenshot

Directions

Release Requisition RQ-15-1080-1080C-1080L-00000000858 - Search Items Status: 1RI - In Progress

Search Using:

Advanced Search

Search Using:

Contract/PO # Description

Item Description Vendor Name

Catalog

Item Type

UNSPSC Segment-Family

UNSPSC Class

Commodity-EPP ☐ Cooperative Purchasing ☐

Result Type: ☐ Show Orderable Only

Item #	Quantity	Description	Unit Cost	UOM	Conversion Vendor	76-12 - Refuse disposal and treatment 15 - Refuse collection and disposal	0.00%	C9242-vCurrent / 2	No	
<input checked="" type="checkbox"/>	<input type="text" value="1"/>	0	Solid Waste and Recycling Services: Municipal Solid Waste, Construction & Demolition Waste, Bulky Waste, Asphalt Brick &...	\$0.00	EA - Each	Conversion Vendor	76-12 - Refuse disposal and treatment 15 - Refuse collection and disposal	0.00%	C9242-vCurrent / 2	No

<< first < prev 1 next > last >>

7. Enter search criteria to find the item or service.

Click **Find It**

Check the box next to the item(s) and put at least a 1 in the quantity column

Click **Add to Req & Exit** to return to the items tab.

Click **Add to Req & Next Page** to continue to the next page and add more items.

Release Requisition RQ-15-1080-1080C-1080L-00000000858 Status: 1RI - In Progress

General **Items** Vendors Distributors Address Accounting Routing Attachments Notes Reminders Summary

General Item Information Validation Errors

- Total for master blanket #C9242-vCurrent must be greater than \$0.00.

Sort by Column: ☐ Sort Descending

Item #	Links	Print Sequence	Quantity	Minimum Order Quantity	Catalog Price/ Unit Cost	Net Unit Cost	UOM	Total Discount Amt.	Tax Rate	Tax Amount	Total Cost	Delete
1	Master Blanket # / Line # C9242-vCurrent / 2	<input type="text" value="1.0"/>	<input type="text" value="1.0"/>	0.0	Enter Info	\$0.00	EA - Each	\$0.00	\$0.00	\$0.00	\$0.00	<input type="checkbox"/>
Total											\$0.00	

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8. Click **Enter Info**, this allows you to open more detail and edit or update the item.

Job Aid:

How to Create a Solicitation Enabled Bid using a Release Requisition

Screenshot

Release Requisition RQ-15-1080-1080C-1080L-00000000858 Status: 1RI - In Progress

General **Items** Vendors Distributors Address Accounting Routing Attachments Notes Reminders Summary

General Vendors Address Accounting Notes

Item # 1 Item Type Normal
 Print Sequence* 1.0 Item Status 1RI - In Progress
 Master Blanket # / Line # C9242-vCurrent / 2 Minimum Order Quantity 0.0
 Master Blanket Line Description: Solid Waste and Recycling Services: Municipal Solid Waste, Construction & Demolition Waste, Bulky Waste, Asphalt Brick & Concrete, White Office Paper, Mixed Paper, Paper Shredding, Secure Document Destruction, Old Corrugated Cardboard, Metal Cans & Containers, Plastic Bottles & Containers, Glass Containers, Leaves & Yard Waste, Food Waste, Scrap Metal, Textiles, Street Sweeping, White Goods. Request quotes for pricing.
 Description* Quote for solid waste removal. See Attachment for Details

Quantity	Catalog Price/ Unit Cost	Net Unit Cost	UOM	Discount %	Total Discount Amt.	Total
1.0	1.00	\$1.00	EA	0.0	0.0	\$1.00

Price Reference #

UNSPSC Segment-Family: 76-12- Refuse disposal and treatment Tax Rate:
 UNSPSC Class: 15- Refuse collection and disposal Tax Amount: \$0.00
 Commodity-EPP: Extended Amount: \$1.00

Manufacturer: Brand: Model:
 Make: Packaging

Save & Exit Save & Continue Save & Copy Reset Cancel & Exit

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Directions

9. Every Master Blanket is different in how the items are listed; if the Description is every item or service offered, delete the text and enter an accurate description with detail for the item/service you want a quote for.

Note: You can use the attachments tab to add further detail from a word or excel document.

The following are fields that should be completed:

- **Print Sequence #**: change this field if the order the requisition line items should print is different from the Item # order (use if requesting quotes for multiple line items)
- **Description***: description of the item or service; can hold up to 400 characters.
- **Quantity**: enter quantity if known or enter 1 if unknown
- **Unit Cost**: enter cost of item/service per 'unit' of quantity, enter 1 if unknown
- **Net Unit Cost**: COMMBUYS auto updates
- **UOM**: unit of measure; how the item is sold/packaged/purchased, select from dropdown menu
- **Discount %**: percentage discount for item/service if applicable
- **Total Discount Amt.**: total amount of discount – populate based on cost and discount %
- **Total**: COMMBUYS auto updates
- **Price Reference #**: enter if applicable, use if referencing another document

Release Requisition RQ-15-1080-1080C-1080L-00000000858 Status: 1RI - In Progress

General **Items** Vendors Distributors Address Accounting Routing Attachments Notes Reminders Summary

General Vendors Address Accounting Notes

Sort by Column: Print Sequence ☐ Sort Descending

Item #	Links	Print Sequence	Item Description								Total Cost	Delete
			Quantity	Minimum Order Quantity	Catalog Price/ Unit Cost	Net Unit Cost	UOM	Total Discount Amt.	Tax Rate	Tax Amount		
1	Master Blanket # / Line # C9242-vCurrent / 2	1.0	Quote for solid waste removal. See Attachment for Detail								\$1.00	<input type="checkbox"/>
			1.0	0.0	\$1.00	\$1.00	EA - Each	\$0.00		\$0.00	\$1.00	<input type="checkbox"/>
Total											\$1.00	

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10. Once complete, review the requisition item(s).

Next, select the **Vendors** tab.

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How to Create a Solicitation Enabled Bid using a Release Requisition

Screenshot

Release Requisition RQ-15-1080-1080C-1080L-00000000858 Status: 1R - In Progress

General Items **Vendors** Distributors Address Accounting Routing Attachments Notes Reminders Summary

Vendor ID	Alternative ID	Vendor Name	Preferred Delivery Method	Vendor Remit-to Address
99000000		Conversion Vendor	Paper Copy Mailed	

Save & Continue Print

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Directions

11. The **Vendors** tab will display Conversion Vendor; this information is correct

You will leave this tab alone and continue to the **Distributors** tab.

Release Requisition RQ-15-1080-1080C-1080L-00000000858 Status: 1R - In Progress

General Items Vendors **Distributors** Address Accounting Routing Attachments Notes Reminders Summary

Vendor Distributor List

Vendor ID	Alternative ID	Vendor Name	Preferred Delivery Method	Select
204281		EOS Approach LLC (SOM/BA) dba Proshred Security	Paper Copy Mailed	<input checked="" type="checkbox"/>
213121		Cintas Document Management	Paper Copy Mailed	<input checked="" type="checkbox"/>
218739		Acme Metals & Recycling, Inc.	Paper Copy Mailed	<input checked="" type="checkbox"/>
219083		Allied Waste	Paper Copy Mailed	<input checked="" type="checkbox"/>
219265		Bill's Trucking Co	Paper Copy Mailed	<input checked="" type="checkbox"/>
220501		Universal Shredding, LLC	Paper Copy Mailed	<input checked="" type="checkbox"/>
223180		ABC Disposal Service Inc.	Paper Copy Mailed	<input checked="" type="checkbox"/>
224174		Southeastern New England Data Destruction LLC	Paper Copy Mailed	<input checked="" type="checkbox"/>
232996		Capitol Waste Services, Inc.	Paper Copy Mailed	<input checked="" type="checkbox"/>
300013		Mid City Scrap Iron	Paper Copy Mailed	<input checked="" type="checkbox"/>
300018		E.L. Harvey & Sons, Inc.	Paper Copy Mailed	<input checked="" type="checkbox"/>
300047		Frade's Disposal, Inc.	Paper Copy Mailed	<input checked="" type="checkbox"/>
300048		Dave Wickles Trucking	Paper Copy Mailed	<input checked="" type="checkbox"/>
300058		New England Recycling Co., Inc.	Paper Copy Mailed	<input checked="" type="checkbox"/>
300058		DBI Waste Systems, Inc.	Paper Copy Mailed	<input checked="" type="checkbox"/>
300100		A1 DATASHRED, LLC	Paper Copy Mailed	<input checked="" type="checkbox"/>
300109		EOMS Recycling Services	Paper Copy Mailed	<input checked="" type="checkbox"/>
300111		Charter Environmental, Inc.	Paper Copy Mailed	<input checked="" type="checkbox"/>
300112		Waste Management of Massachusetts, Inc.	Paper Copy Mailed	<input checked="" type="checkbox"/>
300302		Shred-It Boston Inc.	Paper Copy Mailed	<input checked="" type="checkbox"/>

Save & Continue Reset

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12. The **Distributors** tab displays all the Vendors on the Master Blanket, who we can select to notify.

Check the **Select** box on the right hand side of the screen for the Vendors you require information and price quotes from.

Click **Save & Continue** once complete.

Next, select the **Address** tab.

Release Requisition RQ-15-1080-1080C-1080L-00000000858 Status: 1R - In Progress

General Items Vendors Distributors **Address** Accounting Routing Attachments Notes Reminders Summary

Ship-to Address	Bill-to Address
OSD01 - OSD - Ashburton Place 10th Floor	OSD01 - OSD - Ashburton Place 10th Floor
Accounts Payable 1 Ashburton Place Room 1017 Boston, MA 02108 US Email: test@goperiscope.com Phone: (617)720-8862	Accounts Payable 1 Ashburton Place Room 1017 Boston, MA 02108 US Email: test@goperiscope.com Phone: (617)720-8862

Save & Continue Apply Ship-to to All Items Apply Bill-to to All Items

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13. The **Address** tab opens. Displayed here is the left side of the page with the Ship-to Address. This information can be edited if desired by clicking on the eyeglass icon.

If there is an error message indicating that no valid ship-to address exists. Click on the look-up (eyeglass icon) to select a ship-to address, same steps apply for bill-to address.

Skip to **Step 17** if addresses are correct.



OPERATIONAL SERVICES DIVISION

Job Aid:

How to Create a Solicitation Enabled Bid using a Release Requisition

Screenshot

Lookup Ship-to Address - Release Requisition RQ-15-1080-1080C-1080L-00000000858

Search Using:	ALL of the criteria ▼			
Search Fields:	Department ID	<input type="text"/>	Department Name	<input type="text"/>
	Department Suffix ID	<input type="text"/>	Department Suffix Name	<input type="text"/>
	Location ID	<input type="text"/>	Location Name	<input type="text"/>
	City	<input type="text"/>	County	<input type="text"/>
Browse by:	A B C D E F G H I J K L M N O P Q R S T U V W X Y Z			
<input type="button" value="Find It"/> <input type="button" value="Clear"/>				
<input type="button" value="Close Window"/>				

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Directions

14. Enter the search criteria. Click **Find It** to view the search results.

If no criteria is known clicking **Find it** will return all possible organization addresses.

Lookup Ship-to Address - Release Requisition RQ-15-1080-1080C-1080L-00000000858

Search Using:	ALL of the criteria ▼			
Search Fields:	Department ID	<input type="text"/>	Department Name	<input type="text"/>
	Department Suffix ID	<input type="text"/>	Department Suffix Name	<input type="text"/>
	Location ID	<input type="text"/>	Location Name	<input type="text"/>
	City	<input type="text"/>	County	<input type="text"/>
Browse by:	A B C D E F G H I J K L M N O P Q R S T U V W X Y Z			
<input type="button" value="Find It"/> <input type="button" value="Clear"/>				

Select	Department ID	Department Name	Department Suffix ID	Department Suffix Name	Address Info
<input type="radio"/>	1080CONVD	Default Data Conversion Department	1080	Conversion Address	One Ashburton Place, Room 1017 Boston, MA 02108 US Email: test@goperiscope.com
<input checked="" type="radio"/>	OSD01	Operational Services Division	OSD01	OSD - Ashburton Place 10th Floor	Accounts Payable 1 Ashburton Place Room 1017 Boston, MA 02108 US Email: test@goperiscope.com Phone: (617)720-8862
<input type="radio"/>	SS1	Strategic Sourcing	1234	Strategic Sourcing-1	Tim Kennedy 1 Ashburton Pl Boston, MA 02111 US Email: tim.kennedy1@state.ma.us Phone: (999)666-3333

15. The search results display.

Select the desired Address by clicking the radio button in the Select column.

Click the **Select** button on the bottom of the page.

16. The pop-up window closes and the selected address populates.

Release Requisition RQ-15-1080-1080C-1080L-00000000858 Status: 1RI - In Progress

General Items Vendors Distributors **Address** Accounting Routing Attachments Notes Reminders Summary

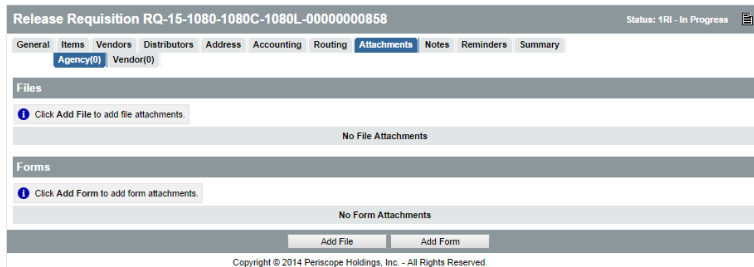
Ship-to Address	Bill-to Address
1234 - Strategic Sourcing-1 <input checked="" type="checkbox"/>	OSD01 - OSD - Ashburton Place 10th Floor <input checked="" type="checkbox"/>
Tim Kennedy 1 Ashburton Pl Boston, MA 02111 US Email: tim.kennedy1@state.ma.us Phone: (999)666-3333	Accounts Payable 1 Ashburton Place Room 1017 Boston, MA 02108 US Email: test@goperiscope.com Phone: (617)720-8862

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How to Create a Solicitation Enabled Bid using a Release Requisition

Screenshot



Release Requisition RQ-15-1080-1080C-1080L-00000000858 Status: 100 - In Progress

General Items Vendors Distributors Address Accounting Routing **Attachments** Notes Reminders Summary

Agency(0) Vendor(0)

Files

Click Add File to add file attachments.

No File Attachments

Forms

Click Add Form to add form attachments.

No Form Attachments

Add File Add Form

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Directions

17. Click the **Attachments** tab. The **Attachments** tab displays.

If any files auto-attach: review, keep or delete as necessary.

Attachments include bid attachments and required forms/contract documents

Click the **Add File** button to add a new file.

Note: Add Form is not currently a working function in COMMBUYS

18. The **Add File** window opens. To select a file from your desktop, click the **Browse** button. This will search for documents from your computer. Select the desired file.

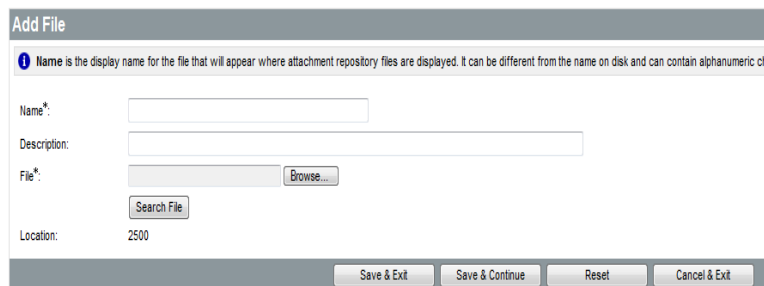
Complete the following fields

- Name** – required; but will be populated with the selected file name if left blank
- Description** – optional

Click **Save & Continue** to add another file or click **Save & Exit** when all files have been added.

Note: Files previously uploaded or added to the Document Library in COMMBUYS are available in the Attachment Repository. To locate and attach from the Repository, click the **Search File** button and complete the advanced search criteria.

For additional information on adding attachments refer to the job aid **How to Search for and Use Attachments in COMMBUYS**.



Add File

Name is the display name for the file that will appear where attachment repository files are displayed. It can be different from the name on disk and can contain alphanumeric characters.

Name*:

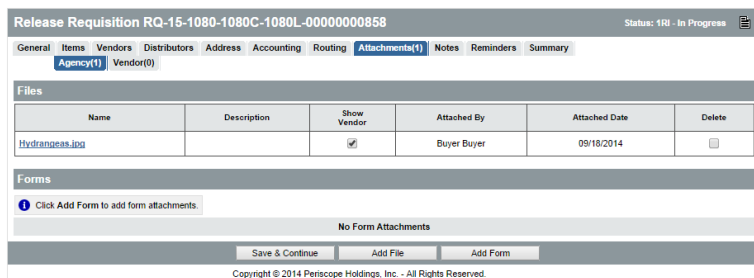
Description:

File*: Browse...

Search File

Location: 2500

Save & Exit Save & Continue Reset Cancel & Exit



Release Requisition RQ-15-1080-1080C-1080L-00000000858 Status: 100 - In Progress

General Items Vendors Distributors Address Accounting Routing **Attachments(1)** Notes Reminders Summary

Agency(1) Vendor(0)

Files

Name	Description	Show Vendor	Attached By	Attached Date	Delete
Hydranacaa.jpg		<input checked="" type="checkbox"/>	Buyer Buyer	09/18/2014	<input type="checkbox"/>

Forms

Click Add Form to add form attachments.

No Form Attachments

Save & Continue Add File Add Form

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19. Attachment tab redisplay with a list of attached files.



OPERATIONAL SERVICES DIVISION

Job Aid:

How to Create a Solicitation Enabled Bid using a Release Requisition

Screenshot

Release Requisition RQ-15-1080-1080C-1080L-00000000858 Status: 1RI - In Progress

General Items Vendors Distributors Address Accounting Routing Attachments(1) Notes Reminders Summary

Header Information

Requisition Number: RQ-15-1080-1080C-1080L-00000000858 Short Description: SVC quote Status: 1RI - In Progress

Organization: Operational Services Division

Department: OSD01 - Operational Services Division Location: OSDEP - Congress St Required By Date:

Entered Date: 09/18/2014 Requisition Type: Release Type Code:

Requestor: Buyer Buyer Purchaser: Buyer Buyer Fiscal Year: 2015

Contact: Buyer Buyer Contact Phone: (617)488-5054 Alternate ID:

PCard Enabled: No Estimated Cost: \$1.00 Print Format: Requisition print form

Solicitation Enabled: Yes

Invoice Method: Three Way Match

Ship-to Address: Accounts Payable 1 Ashburton Place Room 1017 Boston, MA 02108 US Email: test@goperiscope.com Phone: (617)720-8862

Bill-to Address: Accounts Payable 1 Ashburton Place Room 1017 Boston, MA 02108 US Email: test@goperiscope.com Phone: (617)720-8862

Attachments

Agency Files:

Agency Forms:

Vendor Files:

Vendor Forms:

Item Information

Item # 1 : Quote for solid waste removal. See Attachment for Detail 1RI - In Progress

U N S P S C Segment-Family: 76-12-15 Refuse collection and disposal

Blanket/Contract #/Line #	Qty	Minimum Order Quantity	Unit Cost	Net Unit Cost	UOM	Discount %	Total Discount Amt.	Tax Rate	Tax Amount	Total Cost
C9242-cCurrent / 2	1.0	0.0	\$1.00	\$1.00	EA - Each	0.00%	\$0.00		\$0.00	\$1.00

Manufacturer: Brand: Model:

Make: Packaging:

Account Code: Amount:

There is no item accounting available for this item.

Recommended Vendor: 99000000 - Conversion Vendor
One Ashburton Place
Room 1017
Boston, MA 02108
Email: test@goperiscope.com
Phone: 6177203300

Submit for Approval Cancel Requisition Clone Requisition Print

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Directions

20. Click the **Summary** tab. The **Summary** tab displays a summary view of the completed requisition.

Click **Submit for Approval** at the bottom of the page.

Skipped Tabs:

- **Accounting: Phase II**
- **Routing:** populates after submission for approval
- **Notes:** optional, only viewed internally
- **Reminders:** optional, internal reminders sent to organization users

Home Items Documents Vendors

Home - Welcome

News(1) Dashboard

News ID

3

Requisitions >

Bids >

POs >

Receipts >

Invoice >

Quotes >

New

In Progress

Ready for Approval

Ready for Purchasing

Purchaser Assigned

Gone to PO

Gone to Bid

Returned

Canceled

Backorder

Ready for Issue

Partial Issue

Complete Issue

G2B Shopping

21. Once approved, locate the approved requisition by using the Documents dropdown from the Navigation bar.

- **Documents > Requisitions > Ready for Purchasing**

The requisition will also be in your control center under **Reqs** and **Ready for Purchasing**.

Job Aid:

How to Create a Solicitation Enabled Bid using a Release Requisition

Screenshot

Requisitions - Ready for Purchasing

Requisition #	Requisition Date	Description	Type
RQ-14-1080-1080C-1080L-00000000605	05/19/2014	test	Open Market
RQ-14-1080-OSD01-OSD10-00000000604	05/19/2014	test open market solicitation enabled	Release
RQ-14-1080-OSD01-OSDPL-00000000581	05/12/2014	Quick Buy Requisition	Release

Exit

Directions

22. Requisitions meeting the criteria display. Click the desired blue hyperlink in the **Requisition #** column to open the Bid.

23. The requisition opens to the **Summary** tab.

Scroll to the bottom of the page and click the **Convert to Bid** button.

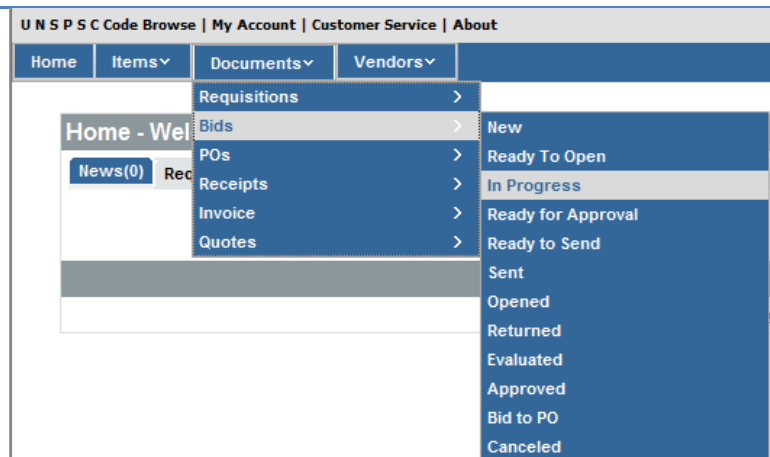
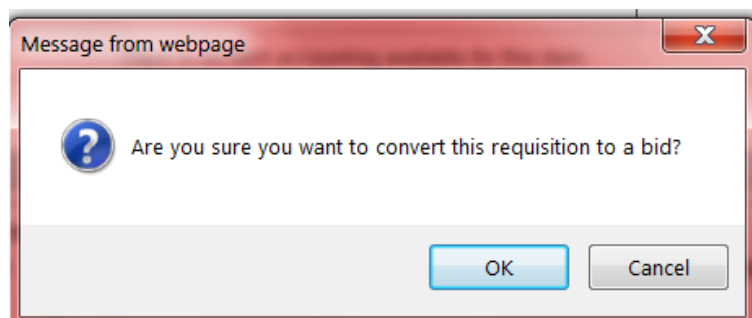
24. Click the **OK** button to confirm.

You are returned to the Homepage.

25. Locate the Bid by using the documents dropdown from the navigation bar.

- **Documents> Bids> In progress.**

The bid will also be in your control center under **Bids** and **In Progress**



Job Aid:

How to Create a Solicitation Enabled Bid using a Release Requisition

Screenshot

Open Market Bid BD-15-1080-OSD01-OSDEP-00000000270 Status: ZBI - In Progress

General Validation Errors

- The following required fields are missing: bid opening date, available date.

Bid Number: BD-15-1080-OSD01-OSDEP-00000000270 Description: SWC quote

Status: ZBI - In Progress Purchaser: Buyer, Buyer

How Solicited: Email Type Code:

Department: OSD01 - Operational Services Division Fiscal Year: 2015

Location: OSDEP - Congress St Organization: Operational Services Division

Show on Web: ☒ Allow Electronic Response: ☒

Required Date: Bid Opening Date: HHMMSS AM or PM

Purge Date: (MM/DD/YYYY)

Bid Type: Closed Bid Informal Bid: ☐

Control Code: Estimated Cost: \$1.00

Print Dest Detail: Always Alternate ID:

Purchase Method: Open Market

Tax Rate: Print Format: Bid Print Form

Item Single Award Only: ☐ Solicitation Enabled: Yes

Info Contact: Contact Buyer Buyer at (617)488-5054

Pre-Bid Conference: (Max size: 250 characters)

Bulletin Desc: (Max size: 500 characters)

Quote Notification: ☐

Invoice Method: Three Way Match

Transaction Size (Commonwealth Departments Only):

Bid Field Demo:

Date Last Updated: 09/18/2014 05:17:55 PM User last Updated: Buyer Buyer

Save & Continue

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Directions

26. The Bid screen opens to the **General** tab where any necessary updates can be made.

All information from the requisition is populated into the Bid.

The fields that require completion include:

- Available Date** – Enter the date the Bid (solicitation) is made available to vendors to submit quotes. Click the calendar icon to set the desired month, day, and time.
- Bid Opening Date** – date the Bid will close and quotes can be opened for viewing. Click the calendar icon to set the desired month, day, and time.
- Informal Bid**- check box if you wish to view quotes as submitted (prior to the Bid Opening Date). **Note:** This option should only be used for closed bids to vendors on contract. Refer to policy for further clarification.
- Purchase Method**:- Option should default to Open Market. If not then select Open Market from the drop down menu

Click **Save and Continue** to save all changes.

27. All information from the Requisition is now part of the Bid; however you should always review and verify that all information is accurate.

Click the **Items** tab. The Items tab for the Bid opens.

Click the **Address** tab. Verify the Ship-to and Bill-to address.

Click the **Attachments** tab. Verify and/or add files to the Bid if needed. To add a file, click the **Add File** button.

The **Amendments** tab has no functionality until after the Bid is posted.

Open Market Bid BD-15-1080-OSD01-OSDEP-00000000270 Status: ZBI - In Progress

General Items Address Accounting Routing Attachments(1) Notes Bidders Questions Amendments Q & A Reminders Summary

Bid Number: BD-15-1080-OSD01-OSDEP-00000000270 Description: SWC quote

Status: ZBI - In Progress Purchaser: Buyer, Buyer

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How to Create a Solicitation Enabled Bid using a Release Requisition

Screenshot

Open Market Bid BD-15-1080-OSD01-OSDEP-0000000270 Status: ZBI - In Progress

General Items Address Accounting Routing Attachments(1) Notes **Bidders** Questions Amendments Q & A Reminders Summary

General Subcontractors Quote Activity

Select bidder participation, open or closed, and select vendors to notify

☐ Unrestricted bid, all vendors can view and respond

☒ Restricted bid, only selected vendors can view and respond

Delete	Vendor ID	Vendor Name	Vendor Address	Preferred Delivery Method
<input type="checkbox"/>				
<input type="checkbox"/>	204281	EOS Approach LLC (SCM/WBA) dba Proshield Security	Bid Mailing Address: Add New Address General Mailing Address - Joseph A. Kelly 75 Post Office Park Wilb... 75 Post Office Park Wilbraham, MA 01095	Paper Copy Mailed
<input type="checkbox"/>	300302	Shred-It Boston Inc.	Bid Mailing Address: Add New Address General Mailing Address - Lisa Delgado 2C Gill St Woburn, MA 0180... 2C Gill St Woburn, MA 01801	Paper Copy Mailed

☐ Show Unit Prices to Vendors

☒ Hide Bid Holder List on Vendor Side

Before you look up bid vendors or add a new vendor, please save your unsaved changes. Otherwise you will lose those changes.

[Save & Continue](#) [Lookup & Add Vendors](#)

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Directions

28. Click the **Bidders** tab.

There is no **Vendor** tab on the Bid. COMMBUYS now refers to Vendors as Bidders. All Vendors entered on the requisition will now be listed as Bidders.

If not already done click the radio button next to **Restricted bid**, to ensure that only selected vendors can view and respond.

If you want vendors to see your price, select the **Show Unit Prices to Vendors** checkbox at the bottom of the page.

The **Hide Bid Holder List on Vendor Side** checkbox is automatically checked, this hides the Vendor list from all responding Vendors. Uncheck if desired.

To add more Bidders, click **Lookup & Add Vendors** button.

If any changes have been made click, **Save & Continue**.

29. Click the **Questions** tab.

Ask vendors questions by entering text in the **Question** field.

Select the **Required** checkbox if the questions must be answered before the quote can be submitted by the vendor.

Select a value from the **Response Type** drop-down list to establish a format for the vendor response.

Select the **Save & Continue** button to save your entries.

Open Market Bid BD-15-1080-OSD01-OSDEP-0000000270 Status: ZBI - In Progress

General Items Address Accounting Routing Attachments(1) Notes Bidders **Questions** Amendments Q & A Reminders Summary

Delete	Question #	Print Sequence	Required	Question	Response Type
<input type="checkbox"/>	0	1.0	<input checked="" type="checkbox"/>	Are you a small business?	YES/NO

☐ Delete All

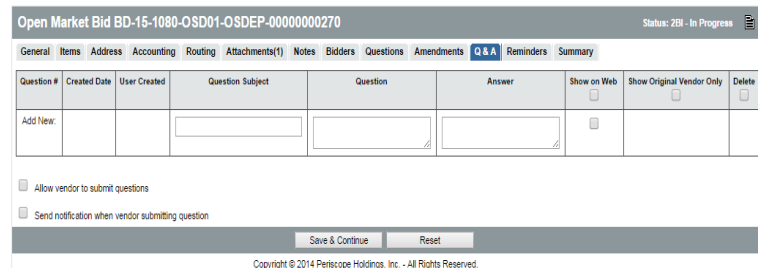
[Save & Continue](#) [Reset](#)

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Screenshot



Open Market Bid BD-15-1080-OSD01-OSDEP-00000000270 Status: ZBI - In Progress

General Items Address Accounting Routing Attachments(1) Notes Bidders Questions Amendments **Q & A** Reminders Summary

Question #	Created Date	User Created	Question Subject	Question	Answer	Show on Web	Show Original Vendor Only	Delete
Add New:								

☐ Allow vendor to submit questions

☐ Send notification when vendor submitting question

Save & Continue Reset

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Directions

30. Click the **Q&A** tab. To dialogue with vendors, select the **Allow vendor to submit questions** checkbox.

If you would like COMMBUYS to notify you when a vendor submits a question, select the **Send notification when vendor submitting question** checkbox.

If desired, you and/or the vendor can enter a **Question Subject** and **Question** into the respective fields, and the other party can respond in the **Answer** field.

If you wish to display the dialogue on the Web, select the **Show on Web** checkbox. The **Show Original Vendor Only** checkbox is available if appropriate.

31. If desired, click the **Reminders** tab to send a reminder to yourself or another person within your organization.

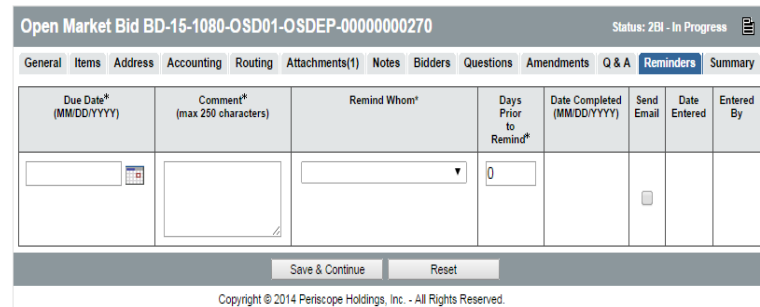
Use the calendar icon in the **Due Date** field to select the date of the reminder then enter your reminder text in the **Comment** field.

Select yourself or another internal recipient in the drop-down menu next to the **Remind Whom** field.

If you would like to send a “tickler” or pre-notification in advance of the reminder, enter the number of days of the pre-notification in the **Days Prior to Reminder** field.

If you would like the reminder send via email, select the **Send Email** checkbox.

When complete, click the **Save & Continue** button.



Open Market Bid BD-15-1080-OSD01-OSDEP-00000000270 Status: ZBI - In Progress

General Items Address Accounting Routing Attachments(1) Notes Bidders Questions Amendments Q & A **Reminders** Summary

Due Date* (MM/DD/YYYY)	Comment* (max 250 characters)	Remind Whom*	Days Prior to Remind*	Date Completed (MM/DD/YYYY)	Send Email	Date Entered	Entered By
			0				

Save & Continue Reset

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OPERATIONAL SERVICES DIVISION

Job Aid:

How to Create a Solicitation Enabled Bid using a Release Requisition

Screenshot

Open Market Bid BD-15-1080-OSD01-OSDEP-00000000270 Status: 2B1 - In Progress

General Items Address Accounting Routing Attachments(1) Notes Bidders Questions Amendments Q & A Reminders Summary

Header Information

Bid Number:	BD-15-1080-OSD01-OSDEP-00000000270	Description:	SWC quote	Status:	2B1 - In Progress
Purchaser:	Buyer Buyer	Minor Status:		How Solicited:	Email
Organization:	Operational Services Division	Department:	OSD01 - Operational Services Division	Location:	OSDEP - Congress St
Fiscal Year:	15	Allow Electronic Quote:	Yes	Required Date:	
Show On Web:	Yes	Available Date:	09/23/2014 10:39:00 AM		
Bid Opening Date:	09/30/2014 10:39:00 AM	Informal Bid:	No		
Purge Date:		Estimated Cost:	\$1.00	Print Dest Detail:	
Bid Type:	Closed Bid	Purchase Method:	Open Market	Catalog Id (for contract):	
Control Code:		Blanket/Contract End Date:		Type Code:	
Alternate ID:		Bulletin Desc:		Pre-Bid Conference:	
Blanket/Contract Begin Date:		Acknowledge inclusion required:	No	Hour of Acknowledge inclusion:	0.0
Info Contact:	Contact Buyer Buyer at (017)488-5054	Quote Notification:	No		
U N S P S C Code Certified Required:	No	User last Updated:	Buyer Buyer	Item Single Award Only:	No
Subcontractor Info:		Bill to Address:	Accounts Payable 1 Ashburton Place Room 1017 Boston, MA 02108 US Email: test@openerscope.com Phone: (017)720-8852	Print Format:	Bid Print Form
Date Last Updated:	09/23/2014 10:49:21 AM				
Ship to Address:	Accounts Payable 1 Ashburton Place Room 1017 Boston, MA 02108 US Email: test@openerscope.com Phone: (017)720-8852				

Solicitation Enabled: Yes
Invoice Method: Three Way Match

Bidders:

Vendor Id	Vendor Name	Preferred Delivery Method	Notifications	Responded
204281	EOS Approach LLC (SOMWBA) dba ProShield Security	Paper Copy Mailed	No	
300302	Shred-it Boston Inc.	Paper Copy Mailed	No	

Transaction Size (Commonwealth Departments Only):
Bid Field Demo:

Attachments

Files:

Forms:

Item Information

Item # 1: Quote for solid waste removal. See Attachment for Detail 2B1 - In Progress

U N S P S C Code: 75-12-15
Refuse collection and disposal

Req # / Item # BD-15-1080-1080C-1080L-00000000058 / 1

Qty	Unit Cost	UCM	Total Discount Amt.	Tax Rate	Tax Amount	Total Cost
1.0	\$1.00	EA - Each	\$0.00		\$0.00	\$1.00

Manufacturer: Brand: Model: Amount

Make: Packaging: Amount

Account Code: Amount

There is no item accounting available for this item.

Submit for Approval Cancel Bid Clone Bid Print

Directions

32. Click the **Summary** tab to review the bid information.

Scroll to the bottom of the page and click the **Submit for Approval** button.

A pop up message appears asking if you want to submit this bid.

Click **OK**

Open Market Bid BD-15-1080-OSD01-OSDEP-00000000270 Status: 2B1 - Ready to Send

General Items Address Accounting Routing Attachments(1) Notes Bidders Questions Amendments Q & A Reminders Summary

Header Information

Bid Number:	BD-15-1080-OSD01-OSDEP-00000000270	Description:	SWC quote	Status:	2B1 - Ready to Send
Purchaser:	Buyer Buyer	Minor Status:		How Solicited:	Email
Organization:	Operational Services Division	Department:	OSD01 - Operational Services Division	Location:	OSDEP - Congress St
Fiscal Year:	15	Allow Electronic Quote:	Yes	Required Date:	
Show On Web:	Yes	Available Date:	09/23/2014 10:39:00 AM		
Bid Opening Date:	09/30/2014 10:39:00 AM	Informal Bid:	No		
Purge Date:		Estimated Cost:	\$1.00	Print Dest Detail:	
Bid Type:	Closed Bid	Purchase Method:	Open Market	Catalog Id (for contract):	
Control Code:		Blanket/Contract End Date:		Type Code:	
Alternate ID:		Bulletin Desc:		Pre-Bid Conference:	
Blanket/Contract Begin Date:		Acknowledge inclusion required:	No	Hour of Acknowledge inclusion:	0.0
Info Contact:	Contact Buyer Buyer at (017)488-5054	Quote Notification:	No		
U N S P S C Code Certified Required:	No	User last Updated:	Buyer Buyer	Item Single Award Only:	No
Subcontractor Info:		Bill to Address:	Accounts Payable 1 Ashburton Place Room 1017 Boston, MA 02108 US Email: test@openerscope.com Phone: (017)720-8852	Print Format:	Bid Print Form
Date Last Updated:	09/23/2014 10:49:21 AM				
Ship to Address:	Accounts Payable 1 Ashburton Place Room 1017 Boston, MA 02108 US Email: test@openerscope.com Phone: (017)720-8852				

Solicitation Enabled: Yes
Invoice Method: Three Way Match

Bidders:

Vendor Id	Vendor Name	Preferred Delivery Method	Notifications	Responded
204281	EOS Approach LLC (SOMWBA) dba ProShield Security	Paper Copy Mailed	No	
300302	Shred-it Boston Inc.	Paper Copy Mailed	No	

Transaction Size (Commonwealth Departments Only):
Bid Field Demo:

Attachments

Files:

Forms:

Item Information

Item # 1: Quote for solid waste removal. See Attachment for Detail 2B1 - Ready to Send

U N S P S C Code: 75-12-15
Refuse collection and disposal

Req # / Item # BD-15-1080-1080C-1080L-00000000058 / 1

Qty	Unit Cost	UCM	Total Discount Amt.	Tax Rate	Tax Amount	Total Cost
1.0	\$1.00	EA - Each	\$0.00		\$0.00	\$1.00

Manufacturer: Brand: Model: Amount

Make: Packaging: Amount

Account Code: Amount

There is no item accounting available for this item.

Send Bid Actions

Option(s) ☒ Change bid status to "Sent" and notify vendors ☐ Change bid status to "Sent" only.

Send Bid

Cancel Bid Clone Bid Print

33. Once the bid is approved, return to the Summary page and scroll to the bottom of the page and click the **Send Bid** button.

This will notify any vendor listed on the bid as well as post it on COMMBUYS for all vendors to search and bid on.

Job Aid:

How to Create a Solicitation Enabled Bid using a Release Requisition

Screenshot

Vendor Notification Result

Subject: Bid Notification - BE# 0000144, Show War Party

Email Recipients

Delivery Date: 01/14/2014 02:14:03 PM

VendorID	Vendor Name	Email Address
000001	bid of Style LTD	Stylor Stylor (india.banis-grant@accenture.com)

OK

Status: 2BS - Sent



Directions

34. Click the **OK** button to complete the process.

The Bid status updates to 'Sent' and will appear on COMMBUYS based on the available date and bid opening dates.